



The Oregon Affordable Housing Management Association Presents

Bite-Sized HOTMA

A comprehensive HOTMA course divided into six, convenient, digestible sessions.

January 15 & 22, February 10 & 19, April 22 & 29, 2026

On January 1, 2026, (assuming Owner software is HOTMA compliant and new leases and other forms are ready), HUD plans to start enforcing the most comprehensive changes to the way HUD properties determine eligibility and calculate income and rent since 1981, when Congress raised the rent cap from 25% to 30% of Adjusted Income. **The course will include everything that is known about what, how, and when to implement the numerous HOTMA changes, helpful resources, and tools, so that, whatever the final deadline turns out to be, after completing the course, you will be ready for HOTMA!** *The webinars will be recorded, so if you can't attend one of the sessions, we'll make sure you receive the recording.*

AGENDA & TIME FRAME PER SESSION

Session #1: HOTMA Income Rules, (January 15, 1 PM to 2:30 PM)

This session covers updates to the treatment of foster children and adults, new income exclusions, revised calculation methods, the new verification hierarchy, & other changes to verification requirements. It also explores adopting means-tested and streamlined approaches and incorporating student financial aid across HUD programs.

Session #2: HOTMA Asset Rules, (January 22, 10 AM to 11:30 AM)

This session addresses updates like new asset exclusions, thresholds, the treatment of real property and non-essential personal property, changes in verification requirements, new methods of imputing income, the impact of means-tested verification, and the self-certification process for assets.

Session #3: HOTMA Allowances and Deductions, (February 10, 1 PM to 2:30 PM)

Highlights include CPI-based adjustments, the increased factor (from 3% to 10%) for calculating medical and disability expenses, phase-in provisions for existing tenants, general relief measures, owner choices for new tenants, and discretionary hardship policies.

Session #4: HOTMA Annual Recertification, (February 19, 1 PM to 2:30 PM)

This session explains and demonstrates updated methods for determining income, expanded use of the Enterprise Income Verification (EIV) system, and new owner options for changes within 90 days prior to annual recertifications.

Session #5: HOTMA Interims, (April 22, 1 PM to 2:30 PM)

Covers changes to lease terms, the 10% adjusted income threshold for increases, owner discretion on decreases, restrictions on reviewing increases in earned income, owner options with EIV, non-interim re-examinations, and new limitations on retroactive rent reductions.

Session #6: HOTMA Section 8 Asset Restrictions, New Forms, EIV, De Minimis Errors, and SSN Verification, (April 29, 1 PM to 2:30 PM)

This session details the net cash value cap, restrictions on real estate suitable for occupancy, admission criteria, owner options for current residents, cure opportunities, timelines, and exceptions. It also reviews new forms (leases, HUD50059, HUD-9887, HUD-9887A), implementation guidelines, the impact of minor errors on owners and tenants, suspension of EIV Income Discrepancy reports, enhanced verification methods for Social Security Numbers, and required topics for tenant selection plans.

Our Instructor: **Gwen Volk** has provided training and consulting services in 36 states through **Gwen Volk, InFocus, Inc.** and is one of the most highly respected trainers in the nation. She has extensive knowledge and experience in Section 42 low-income housing tax credit, tax-exempt bond, HOME, Section 8, 236, 202 PAC, 202/811 PRAC and Rural Development programs.

CEU Hours: 9.0 CEUs for those with real estate or property management licenses

Tech Advice: Please participate on a desktop or a laptop. An ethernet connection is preferable.

To Register: Please fill out, "save," and email this fillable form to oregonahma@frontier.com or, print, fill out, and scan the form, emailing it to oregonahma@frontier.com

FINAL Registration Deadline: Wednesday, January 14.

Course Fees: For AHMA members: \$180; for non-members: \$230 *(the fee covers all six sessions)* *The webinars will be recorded, so if you can't attend one of the sessions, we'll make sure you receive the recording.*

Payment Options: **(WE DON'T INVOICE.)**

- Pay by PayPal on this page of our website:
http://www.oregonaffordablehousingmanagement.com/education_schedule.htm
- You can use PayPal as a guest if you don't have a PayPal account. Just follow the instructions in the PayPal shopping cart.
- Or, send your check to Oregon AHMA, P.O. Box 1135, Forest Grove, Oregon 97116
- **Payment is due by Wednesday, January 14.** No refunds after this date; substitutions are welcome!
- Login is contingent upon receipt of payment.

CEUs: This course fulfills 9.0 CEUs for those with broker or property management licenses.

Questions? Contact Oregon AHMA Executive Director Maggie Meikle at oregonahma@frontier.com

Please fill out this section of the form. *(Bite-Sized HOTMA)*

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Contact Person _____ Email Address _____